

**UNITED STATES DEPARTMENT OF THE INTERIOR  
BUREAU OF LAND MANAGEMENT**

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EMS TRANSMISSION: 09/03/2003  
Instruction Memorandum No. NM-2003-068  
Expires: 9/30/2004

To: Field Office Managers

From: State Director, Arizona  
State Director, New Mexico

Subject: Major Category (5101 Cost Recovery) Rights-of-Way (ROWs)

**Purpose:** This Instruction Memorandum (IM) establishes new procedures for prefield work on major ROW projects and the use of Project Management Plans (PMP).

**Background:** Over the last several years, Arizona and New Mexico have processed, and will continue to process in the future, numerous applications for major category linear ROWs. In some cases, environmental contractors have initiated field surveys prior to meeting with all Field Offices involved. Additionally, some BLM staff have inadvertently initiated project-related work without being briefed on the full scope of the project, and without a 5101 cost-recovery account in place.

**Policy/Action:** This IM establishes the policy that no on-the-ground (prefield work) activities are to be authorized until all the affected Field Offices understand the scope of the project, and have completed certain required tasks prior to starting application processing. Therefore, in order to improve consistency, the following procedures are to be implemented at the time a company requests a major category linear ROW across multiple Field Office boundaries in either the State of Arizona or the State of New Mexico.

No prefield work authorizations will be issued until all of the following actions are completed:

1. The appropriate Field Manager, Realty Specialist, and/or project manager in each office has been advised of the project by the applicant;

2. A preapplication meeting has been held;
3. A BLM project lead has been designated;
4. A ROW application (Standard Form 299) and minimum \$10,000-deposit have been received by BLM;
5. A 5101 cost-recovery account, cost reimbursement agreement, and memorandum of understanding or other interagency agreements have been established;
6. A PMP has been developed and agreed to by BLM and the applicant;
7. The applicant has notified all affected agencies of the proposed Project; and
8. The applicant has identified, by legal description, land ownership of all lands potentially affected by the proposal.

The use of a PMP for a major ROW is a new process in Arizona and New Mexico. The PMP is designed to:

1. Clearly define the roles and responsibilities of the various agencies, the applicant, and their contractors; and
2. To establish a schedule for processing the application. An example of a suggested format for a PMP is attached as Appendix A. Additional attachments are Appendix B, Definitions; Appendix C, Sample Timeline; and Appendix D, Sample Project Team Matrix.

For projects involving two or fewer Field Offices, which are not anticipated to be controversial or complex, the use of a PMP will be at the discretion of the Field Manager(s). All other procedures will apply.

**Time Frame:** This IM is effective immediately. These new procedures are intended to ensure that the early stages of processing a complex linear ROW are handled in a timely, coordinated, efficient, and consistent manner.

**Manual/Handbook Sections Affected:** None.

**Contacts:** For questions or further clarification, please contact Carol Kershaw, Arizona State Office at (602) 417-9235, or Cynthia Sandoval, New Mexico State Office at (505) 438-7602.

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Attachments:

- 1 – Standard Form 299 (5 pp.)
- 2 - Appendix A – Example PMP Format (9 pp.)
- 3 - Appendix B – Definitions (2 pp.)
- 4 - Appendix C – Sample Timeline (3 pp.)
- 5 - Appendix D – Sample Project Team Member Matrix (3 pp.)